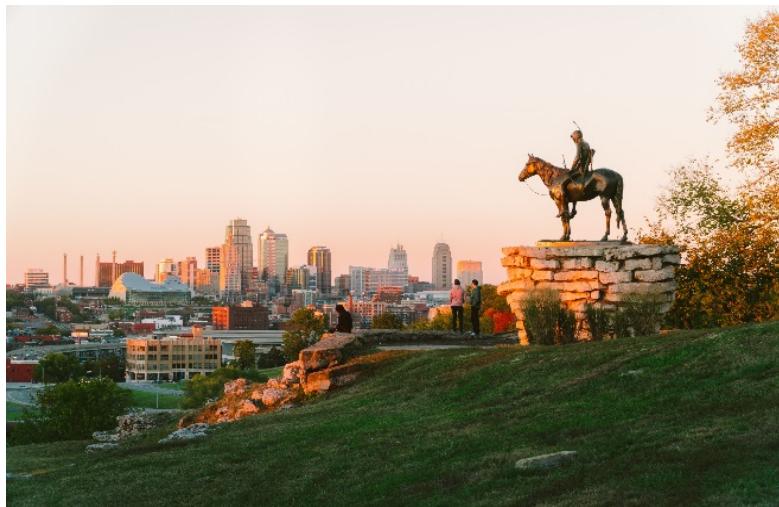


# MISSOURI DIVISION OF TOURISM

MISSOURI FEBRUARY TRAVEL BAROMETER  
(DATA AVAILABLE AS OF 03/15/2022)



# Missouri Travel Barometer



The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.

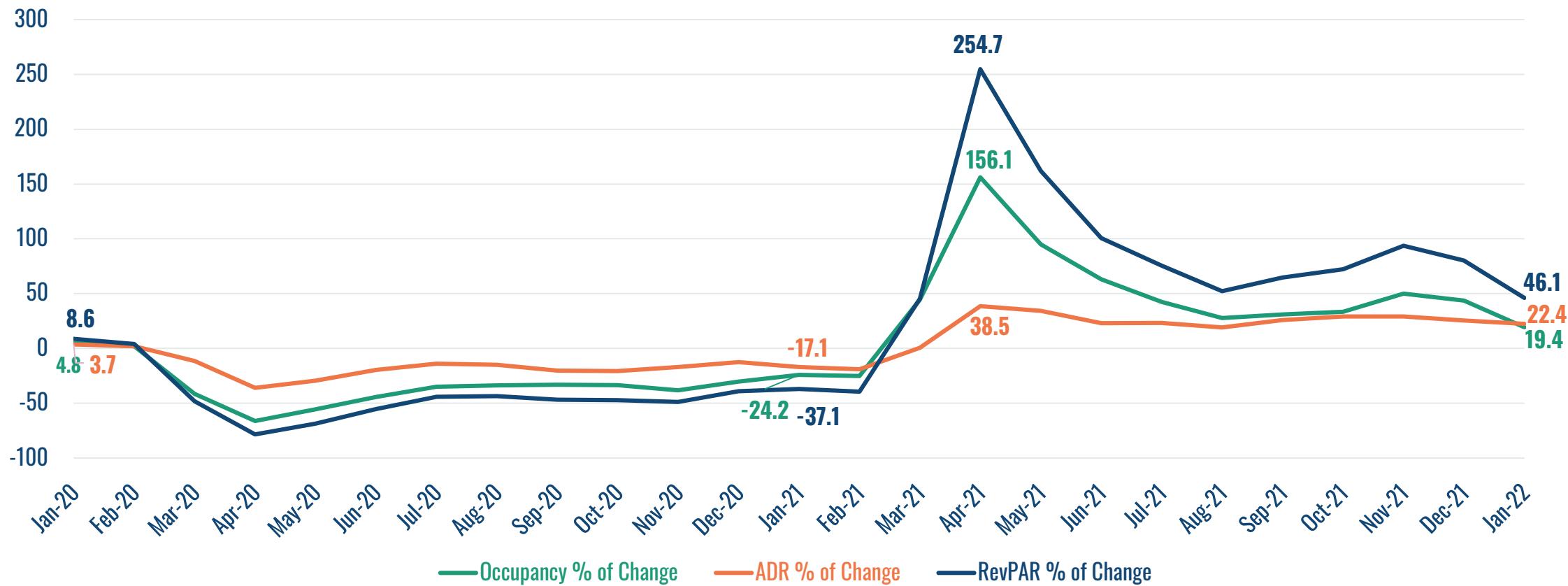
The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

# Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29/2020



## STR Monthly Lodging Trends Percentage of Change from Prior Year



Source: STR, LLC

Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

# Missouri Travel Barometer



## STR Lodging Trends – Week Ended March 5, 2022

OCCUPANCY  
was up  
**23.5%**  
as compared to  
the same week in  
2021

STATEWIDE  
DEMAND  
**INCREASED**  
**23.7%**

ADR  
(Average Daily Room Rate)  
**INCREASED**  
**26.8%**

RevPAR  
(Revenue per Available Room)  
**INCREASED**  
**56.6%**

# Missouri Travel Barometer



## AirDNA Short-Term Rental Trends for Entire Place Rentals

February 2022 Compared to 2021

OCCUPANCY  
was down  
**-5.1%**  
as compared to  
the time period in  
2021

STATEWIDE  
DEMAND  
**INCREASED**  
**52.9%**

STATEWIDE  
SUPPLY  
**INCREASED**  
**61.1%**

RevPAR  
(Revenue per Available Room)  
**INCREASED**  
**2.7%**

# Missouri Travel Barometer



## AirDNA Short-Term Rental Trends for Hotel Comparable Rentals

February 2022 Compared to 2021

OCCUPANCY  
was down  
**-4.4%**  
as compared to  
the time period in  
2021

STATEWIDE  
DEMAND  
**INCREASED**  
**71.0%**

STATEWIDE  
SUPPLY  
**INCREASED**  
**79.0%**

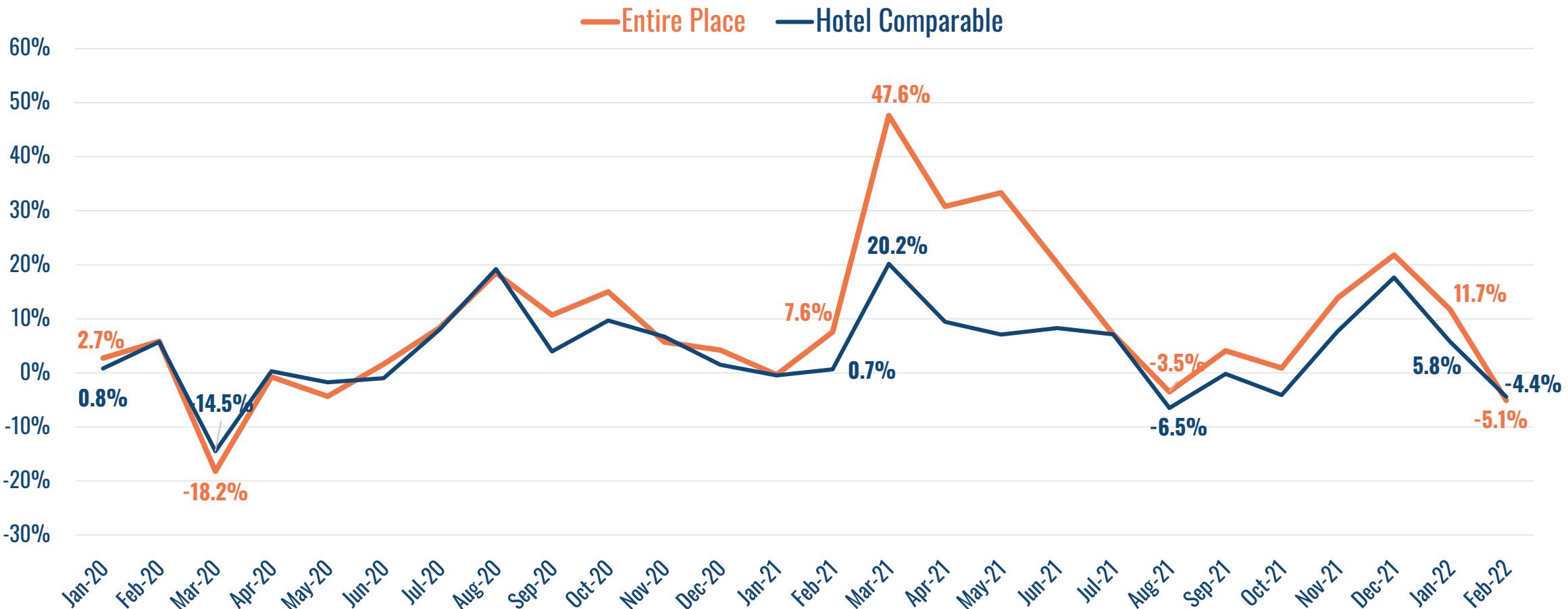
RevPAR  
(Revenue per Available Room)  
**INCREASED**  
**2.8%**

# Missouri Travel Barometer



The effect of Covid-19 first hit the week ending 2/29/2020

## AirDNA Short-Term Rentals Occupancy % of Change from Prior Year



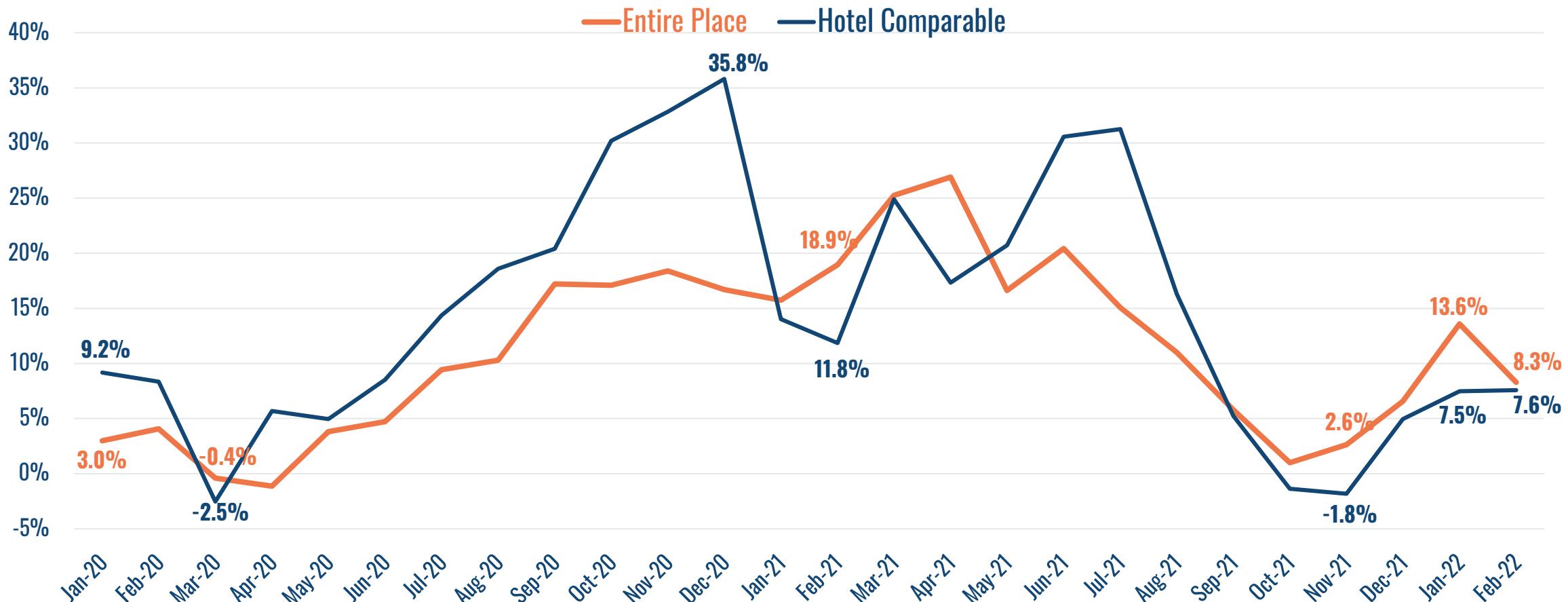
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway. Hotel Comparable Rooms are studio and one bedroom entire place rentals, which AirDNA believes are most likely to compete directly with hotels.

# Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29/2020



## AirDNA Short-Term Rentals ADR % of Change from Prior Year



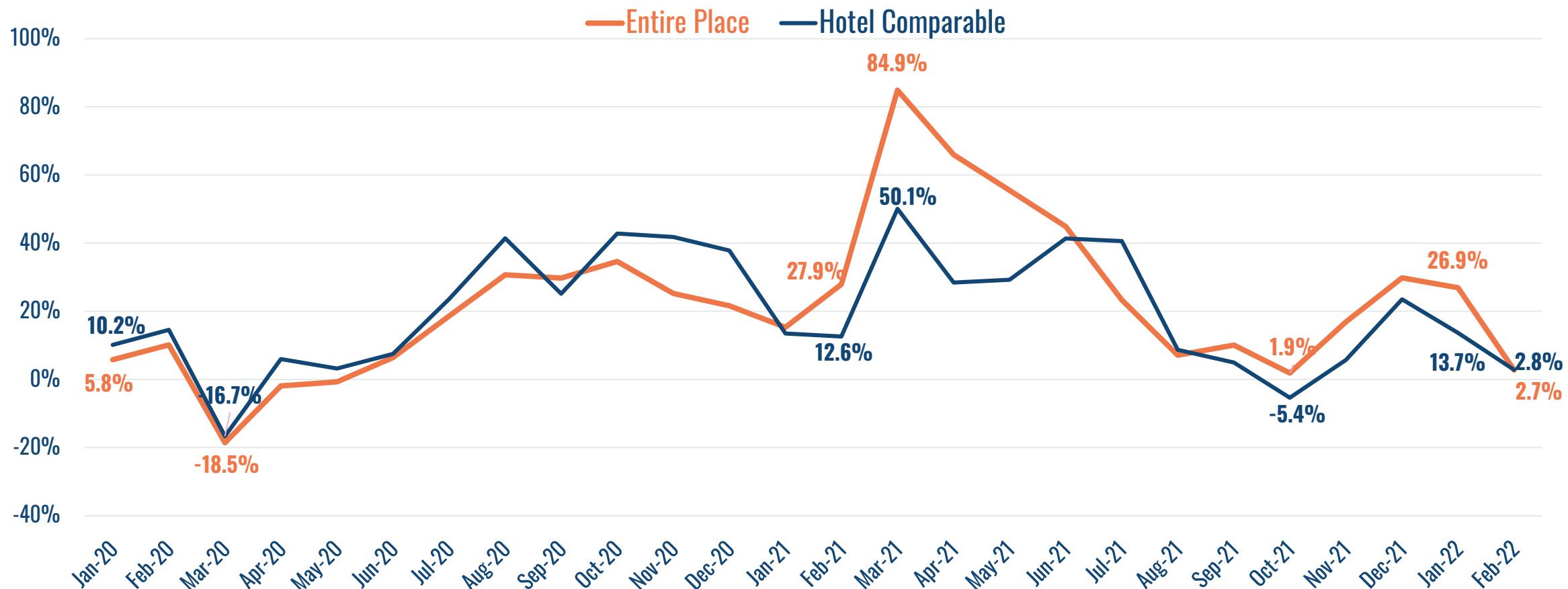
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway. Hotel Comparable Rooms are studio and one bedroom entire place rentals, which AirDNA believes are most likely to compete directly with hotels.

# Missouri Travel Barometer



The effect of Covid-19 first hit the week ending 2/29/2020

## AirDNA Short-Term Rentals RevPAR % of Change from Prior Year



AirDNA listings include short-term rental properties listed by Airbnb and HomeAway. Hotel Comparable Rooms are studio and one bedroom entire place rentals, which AirDNA believes are most likely to compete directly with hotels.

# Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



## NAICS Tourism Business Sales through December 2021

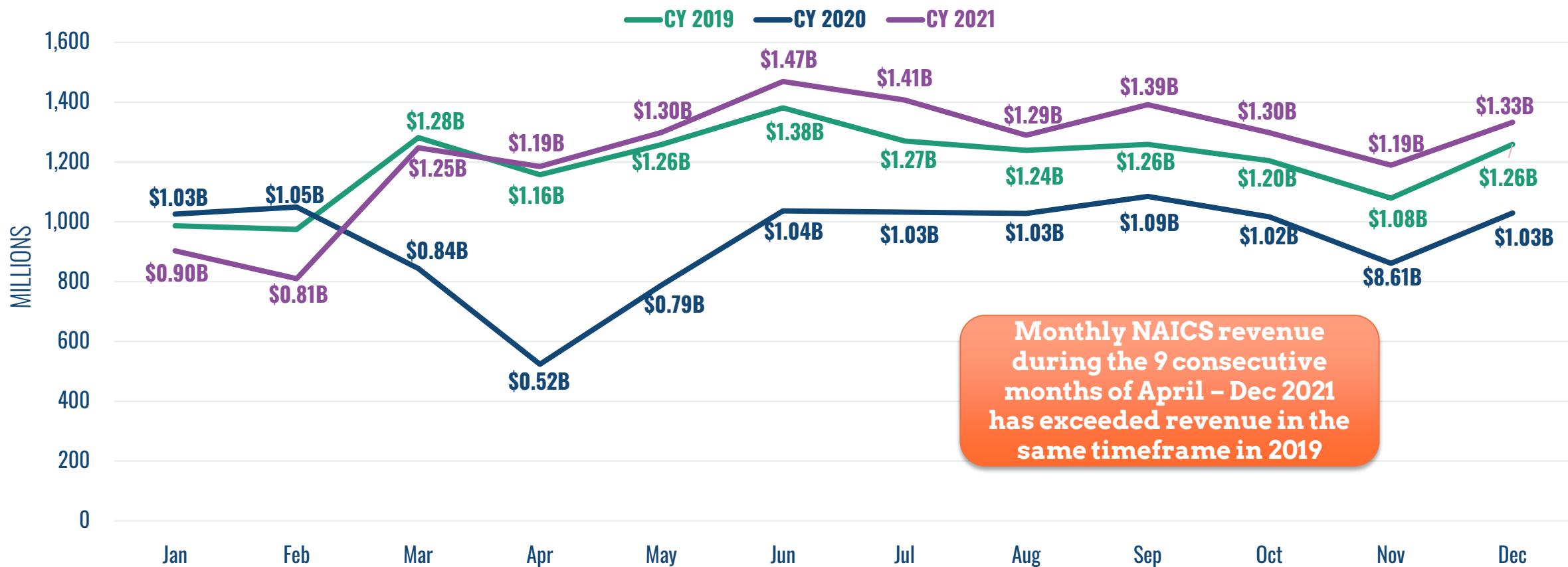


# Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



## CY Sales Revenue from Tourism-Related NAICS



# Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



## CY Sales Revenue from Tourism-Related NAICS

BILLIONS

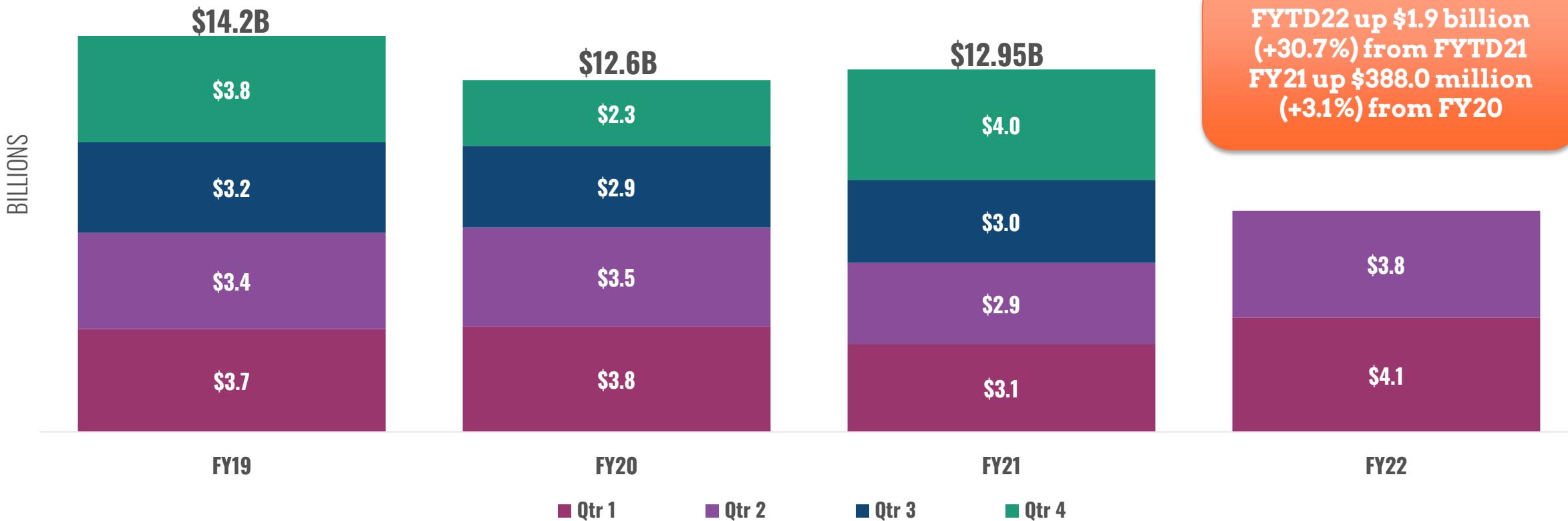


# Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



## FY Sales Revenue from Tourism-Related NAICS

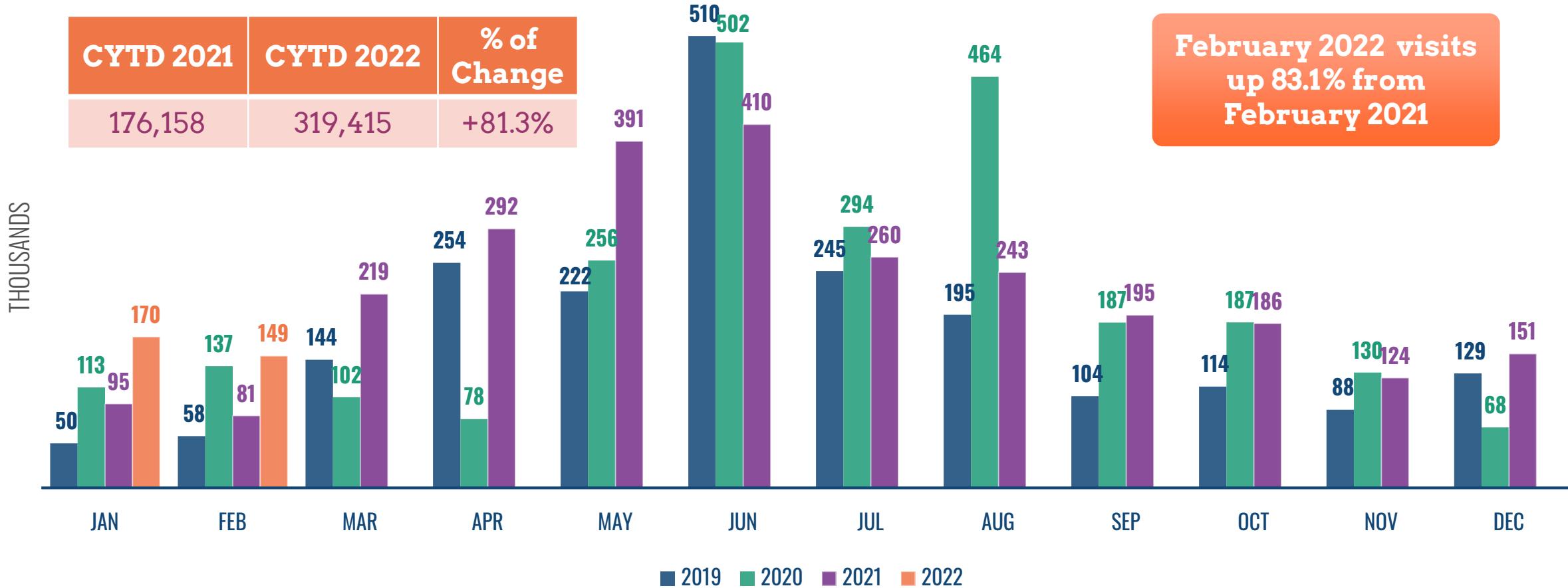


# Missouri Travel Barometer

Visits to the MDT website and marketing responses will always fluctuate due to seasonal traffic patterns



## Calendar Year Visits to VisitMO.com by Month

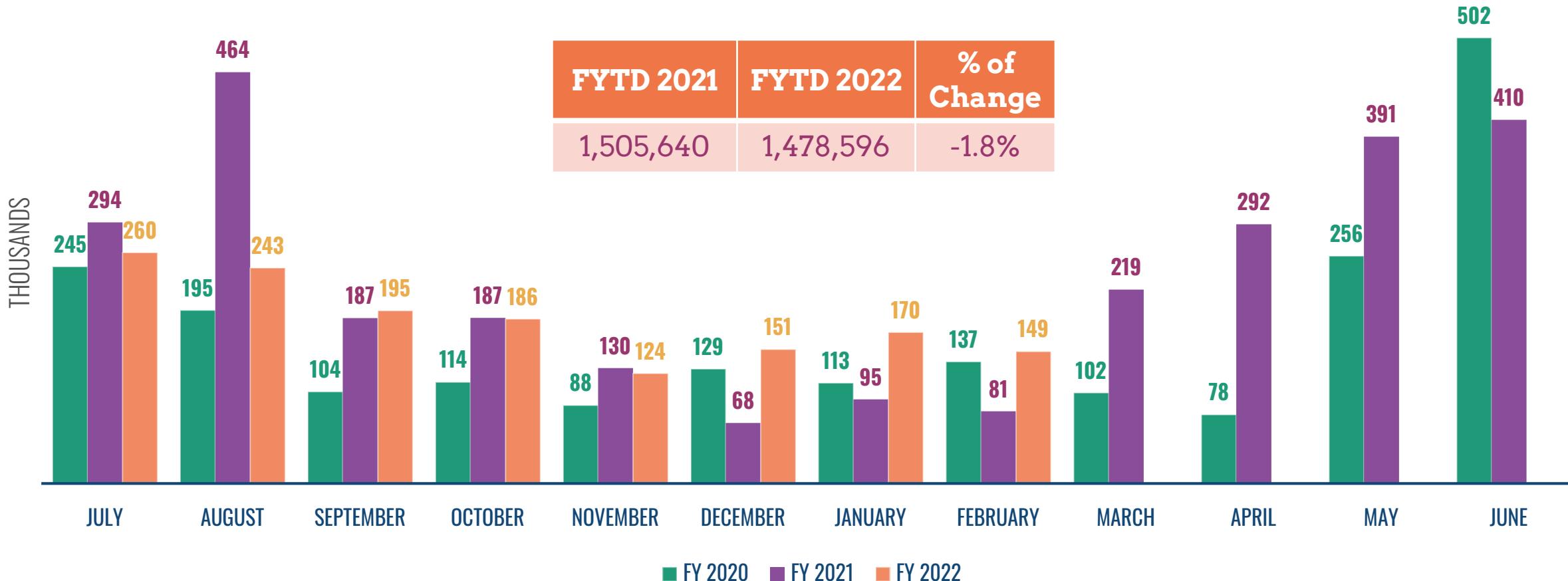


# Missouri Travel Barometer

Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns



## Fiscal Year Visits to VisitMO.com by Month

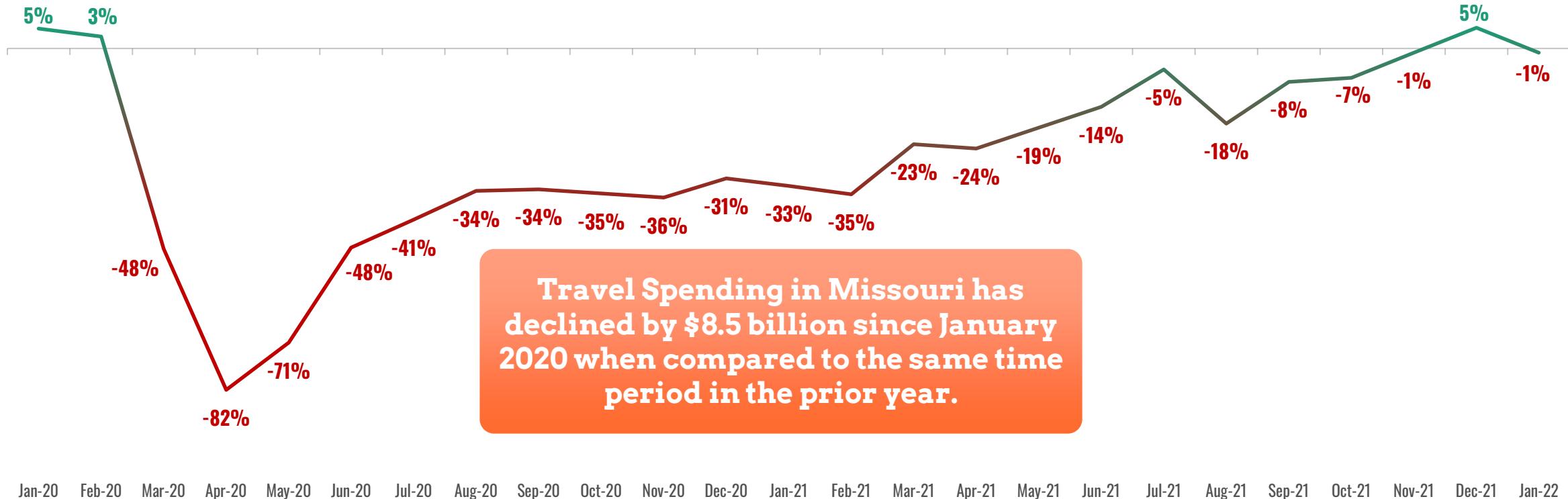


# Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29/2020



## Economic Impact % Change in Monthly Travel Spending in Missouri Compared to 2019



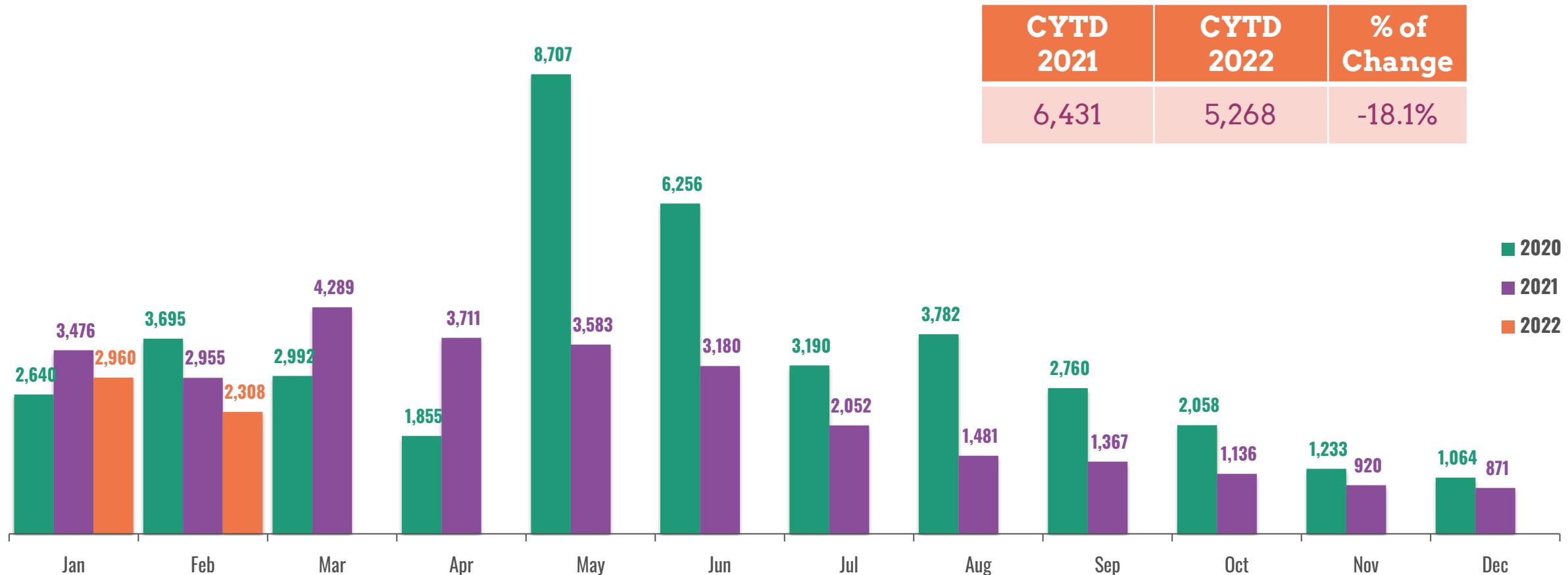
Travel Spending in Missouri has declined by \$8.5 billion since January 2020 when compared to the same time period in the prior year.

# Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020.

## Fulfillment of Travel Guide Orders from All Sources



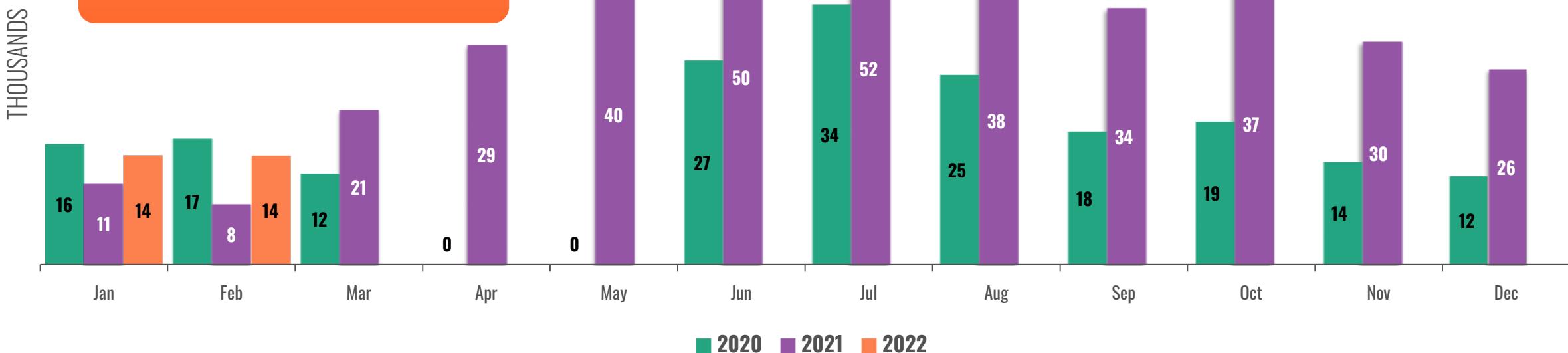
*Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.*

# Missouri Travel Barometer



## Welcome Center Visits: 2022 Calendar Year to Date through February

For CYTD 2022, the centers were up 78% for January – February compared to the same time a year earlier.



Notes: The Welcome Centers were closed March 18<sup>th</sup> – May 31<sup>st</sup> due to social distancing orders. The Centers started closing on weekends on 8/16/2020. (The centers were not open on weekends in 2019 from Jan – Mar). The Kansas City Welcome Center closed at the end of September, and the Hannibal and St. Louis Centers closed at the end of October. In November 2020, the centers switched to being open only Thursday – Monday. On 2/16/2021, the centers switched to being open only Tuesday – Saturday. On 4/11/2021, the centers resumed being open on Sundays with Mondays the only closed days. On 5/10/2021, the centers started opening 7 days a week.

# Missouri Travel Barometer



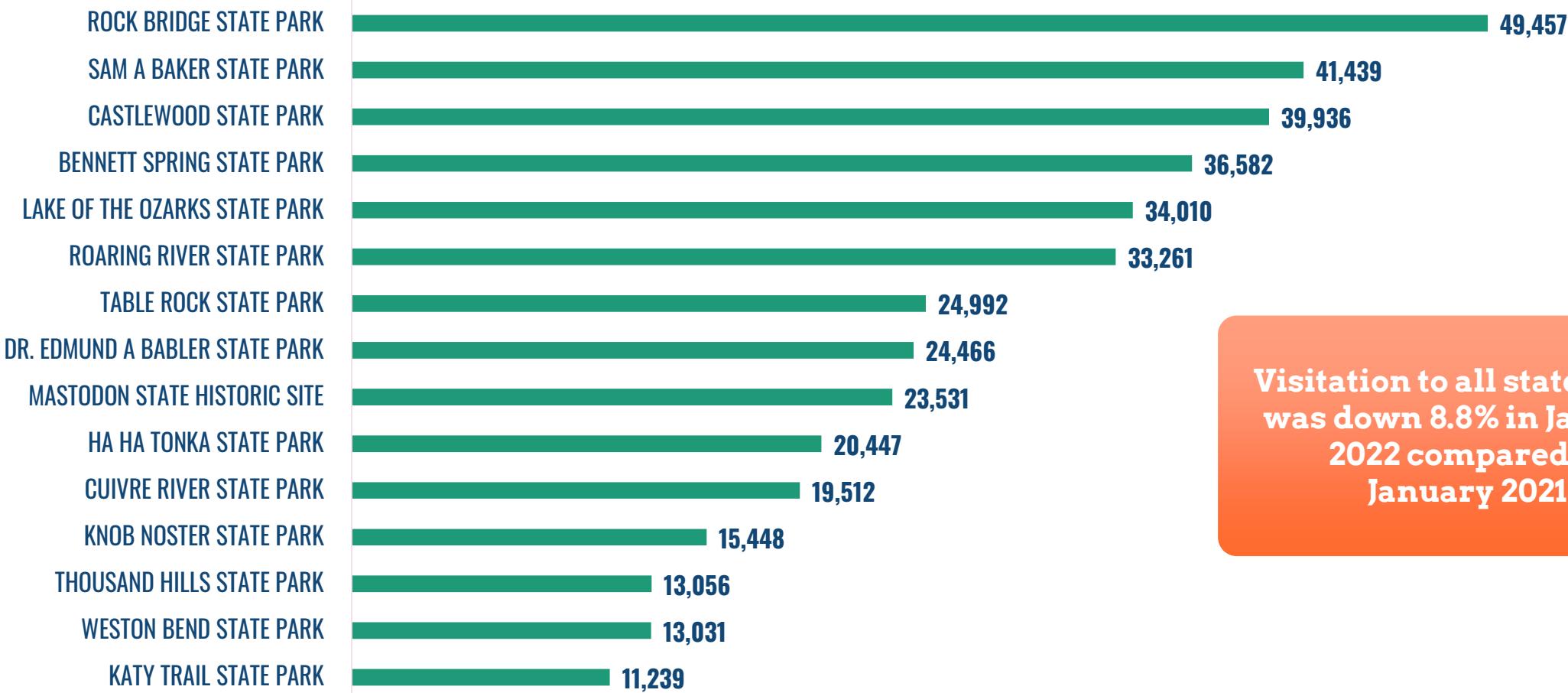
## Visitors to Missouri State Parks during January



# Missouri Travel Barometer



## Most Visited Missouri State Parks during January 2022



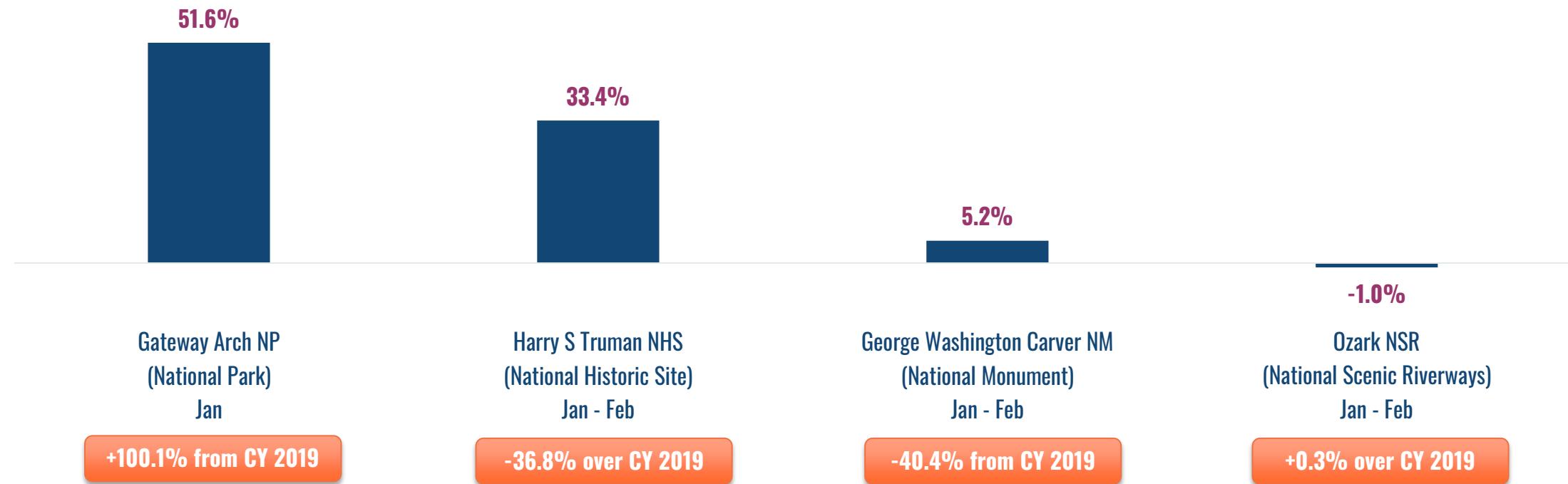
Visitation to all state parks  
was down 8.8% in January  
2022 compared to  
January 2021

# Missouri Travel Barometer



## Missouri National Parks Attendance

**% of Change in Visits to Missouri National Parks  
2022 Compared to 2021**



*Notes: The visitor centers at the Wilson's Creek NB, the George Washington Carver NM and the Harry S Truman NHS closed in mid-March 2020 due to Covid-19 precautions. Truman's home was also closed, but the farm grounds remained open. At the Gateway Arch NP, Tram Rides to the top of the Arch resumed on September 1, 2020 but the Old Courthouse remains closed for renovations.*

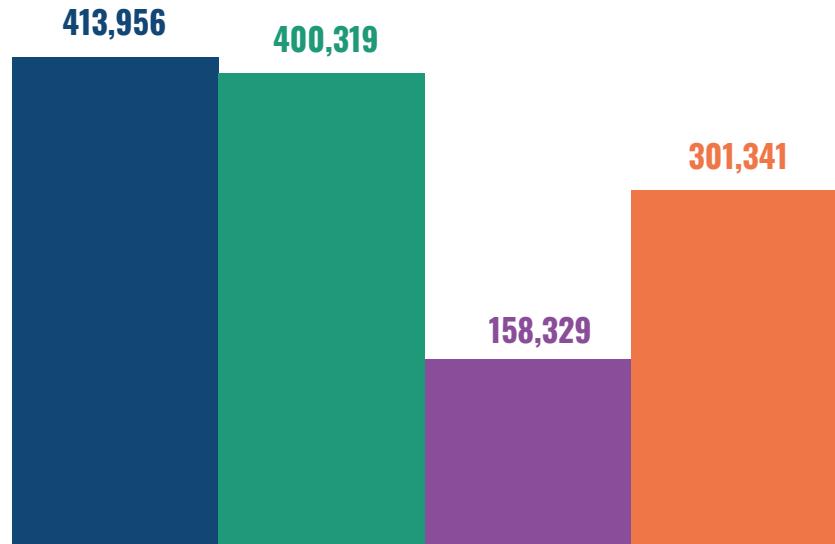
# Missouri Travel Barometer



## KC & STL Airport Deplanements

### Kansas City

THOUSANDS



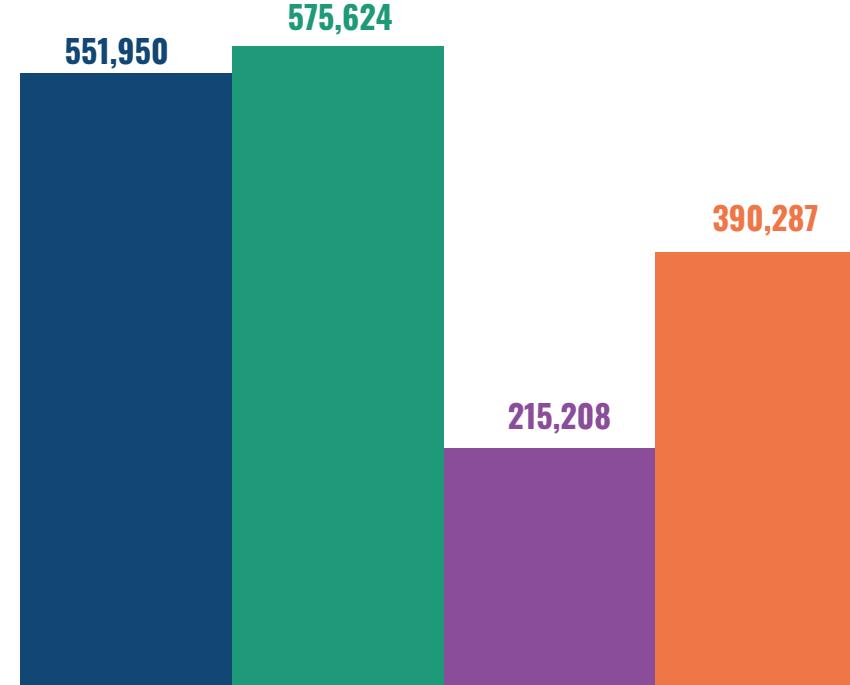
+90.3% over CYTD21  
-27.2% from CYTD19

Jan

■ 2019 ■ 2020 ■ 2021 ■ 2022

### St. Louis

THOUSANDS



+81.1% over CYTD21  
-29.3% from CYTD19

Jan

■ 2019 ■ 2020 ■ 2021 ■ 2022

A photograph of a person white-water rafting down a rocky river. The person is in a small white raft, navigating through large, light-colored granite boulders. The water is turbulent and white. In the background, there is a dense forest of green trees under a clear blue sky.

**THANK YOU**